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AUTHOR Hert, Carol A.; McClure, Charles R.
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ABSTRACT

This study reports findings from a survey of U.S. and Canadian medical libraries belonging to the Association of Academic Health Sciences Library Directors (AAHSLD). Conducted in the spring of 1990 and funded by AAHSLD, the survey had the two primary purposes of assessing the use of the AAHSLD "Annual Statistics" in providing data for decision making, and offering recommendations to improve the usefulness of the "Annual Statistics." Usable responses were received from 83 of the 144 medical libraries surveyed. Both quantitative and qualitative assessments were made on the survey data, and the findings generally suggest satisfaction with the "Annual Statistics." However, the "Annual Statistics" could be improved by including more performance measures and categorizing some of the data differently. Other findings and specific recommendations to improve the publication are included in the report. A copy of the questionnaire and comments on individual questions by the respondents are appended. (7 references) (Author/SD)

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A STUDY OF THE USE OF THE AAHSLD ANNUAL STATISTICS IN MEMBER LIBRARIES

for
STATISTICS COMMITTEE
ASSOCIATION OF ACADEMIC HEALTH SCIENCES LIBRARY DIRECTORS

by
CAROL A. HERT, Ph.D. Candidate
CHARLES R. MCCLURE, Professor

SCHOOL OF INFORMATION STUDIES
SYRACUSE UNIVERSITY, SYRACUSE, N.Y. 13244

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I. INTRODUCTION

The survey, The Use of the AAHSLD Annual Statistics in Member Libraries, was developed and analyzed by Carol A. Hert and Charles R. McClure for the Statistics Committe of the Association of Academic Health Sciences Library Directors (AAHLSD). The survey had several objectives. These were to assess:

- how AAHLSD members were currently using quantitative data for decision making,
- the use of the AAHLSD Annual Statistics in providing data for decision making,
- the current and potential use of performance measures for decision making, and
- possible changes to the Annual Statistics so that its usefulness to members could be improved.

The intent of this report is to present the results of the survey along with additional questions which were raised during analysis of the data. While our goal in this report is not to formally review the body of literature which exists on decision making and the use of quantitative data, it is important to set the survey and its results in a larger context.

With increasing budgetary pressures on libraries, and patrons who are ever more sophisticated and demanding, library administrators have become increasingly concerned with managing their decision making processes better so that resources can be allocated more effectively and efficiently. McClure, paraphrasing Eden and Harris, defines decision making as "that process whereby information is converted into action [and] is largely concerned with the process of acquiring, controlling, and utilizing information to accomplish some objective" (McClure, 1986, p. 324). Managers are turning to the application of quantitative data to aid in this decision making (ARL SPEC Kit no. 153, 1989; Cronin, 1985; and McClure, 1984; 1986).

Traditionally, the generation of statistics from "similar" library types has been used by library managers for a variety of decision making purposes. Unfortunately, these data are often of limited utility for two reasons. They tend to report inputs and/or use of resources rather than outputs (services) or the quality or impact of these services, and the data are often viewed in isolation from the mission, goals, user needs, or organizational constraints of the reporting libraries. In recognition of these concerns, there has been an increasing awareness of the value of performance measures, that is, data which measure the effectiveness and efficiency of library services and activities (Cronin, 1985; Van House, et. al., 1987.; Van House, Weil, and McClure, 1990). Indeed, the Association of College and Research Libraries contracted for the development of a performance measures manual for academic and research libraries which

will be published in June of 1990 (Van House, Weil, and McClure, 1990). Performance measure data enable a manager to assess the quality of services and activities, which may be more useful to planning than the analysis of data which merely report the nature of current operations (McClure, 1984).

What still seems to be less than clear is the connection between statistics and performance measures and their use in decision making (ARL SPEC Kit no. 153, 1989). The results of the current survey are valuable in that they not only provide data for meeting the objectives outlined above, but also address the key research question of how quantitative data, in general, and performance measures, in particular, can be better collected, tabulated, and presented to improve decision making in all types of libraries. Some of the findings from this survey suggest possible strategies to address this question.

II. METHODOLOGY

QUESTIONNAIRE DEVELOPMENT

Usage of the AAHSLD Annual Statistics by member libraries was assessed through a self-administered mail survey (Appendix A). The survey was prepared and analyzed by Carol A. Hert and Charles R. McClure. The questionnaire was developed based on the study objectives enumerated above. The draft questionnaire was reviewed by members of the Statistics Committee and a pretest done by a director of an AAHLSLD member library. Following the initial review and subsequent revisions, a second draft was reviewed by a second medical library director and his administrative staff and minor revisions made. The finalized questionnaire was mailed with a self addressed stamped envelope to all members of the AAHSLD in March, 1990 with a requested return date of April 15, 1990.

RETURN RATE

83 surveys were returned by April 25, 1990 and were analyzed. An additional 13 (total of 96) were returned after April 25; too late to be included in the quantitative analysis. Open-ended responses from all 96 questionnaires were recorded.

PROPORTIONAL REPRESENTATION

The 83 surveys returned by April 25, 1990 were analyzed to determine whether they were representative of the total population of AAHSLD libraries. Proportional representation was important in assuring that results of further analyses would indicate the feelings of AAHSLD member libraries as a whole. Return rate for each group of libraries (as determined from the 1987-1988

Annual Statistics, pp. 174-196) was compared to the number of libraries in each group. Using postmark information, we were able to determine the correct category for 75 of the 83 surveys returned. 8 surveys were un-postmarked and were not included in the analysis.

The numbers and proportions are presented in Table 1 - Response Rate by Library Group. A Chi square test of independence was performed to test whether the proportion of surveys returned from each group was significantly different from the proportion of libraries in that group in the population of AAHLSD libraries.

TABLE 1
RESPONSE RATE BY LIBRARY GROUP

Group	Number of Libraries	Number of Returned Surveys	% of Libraries	% of Returned
I	14	8	9.7	10.7
II	33	13	22.9	17.3
III	50	24	34.7	32.0
IV	17	11	11.8	14.7
non-categorized*	30	19	20.8	25.3
total	144	75	99.9**	100.0

* AAHSLD libraries not included in the categories
** rounding error

The Chi square test indicated no significant difference between the group proportions in the returned surveys and in the population (test statistic = 1.64, region of rejection for Chi square with 4 degrees of freedom > 9.49), and we continued with the analyses assured that the surveys returned were representative of the population of AAHSLD libraries.

QUANTITATIVE ANALYSES

For all closed-end questions, totals and proportions were calculated. Where appropriate, averages were also calculated. In addition to these descriptive statistics, a correlation coefficient was calculated between questions 1 and 6 and a number of Chi Square tests of independence were calculated. These tests will be described more thoroughly in the Results section. SAS statistical software was used for the quantitative analyses (SAS Institute Inc., 1985).

QUALITATIVE ANALYSES

All open-ended responses from the 96 questionnaires which were returned by May 10, 1990 were transcribed (Appendix B - Comments). The comments were then analyzed and major trends identified.

LIMITATIONS

While the survey was able to provide a variety of useful information concerning the use of the Annual Statistics volume, it, like all other self-reporting surveys, may not be a completely accurate picture of the use. People frequently have problems reporting their activities in such a format. We have taken the inherent inadequacy of self-reporting surveys into account in our analysis, and will suggest some alternative research approaches which might be used to validate the data collected with this survey.

III. RESULTS

This section includes both the quantitative and qualitative analyses. Results are organized into 6 sections:

- AAHSLD Members' Use of Quantitative Data
- Performance Measures
- Annual Statistics Data: Amount, Types, Validity, Reliability
- Annual Statistics Data Preparation and Products
- The Categorization Scheme
- Summarization of Trends in Open-ended Comments

Generally, the results suggest satisfaction with the Annual Statistics, but a number of key issues to be addressed were also identified.

AAHSLD MEMBERS' USE OF QUANTITATIVE DATA

Question 1 on the survey assessed the uses AAHSLD members make of quantitative data for decision making in their libraries. Table 2 - Uses of Quantitative Data indicates the number and proportion of respondents who checked each use in question 1.

TABLE 2
USES OF QUANTITATIVE DATA

Use made of quantitative data	Number of respondents	% of total respondents (N=83)
Providing comparisons between your library and others	81	97.6
Providing supporting data for budget requests	77	92.8
Providing salary information	65	78.3
Establishing benchmarks to track library development over time	61	73.5
Providing data for intra-library reports	40	48.2
Providing data for library resources allocation process	33	39.8
Establishing benchmarks for productivity standards	31	37.3
Providing early warning signals of trouble spots in library operation	29	34.9
Calculating performance measures	25	30.1
Providing tools to calculate management formulas	23	27.7
Other	5	6.0

Average number of uses checked by a respondent = 5.7

Question 6 asked respondents to indicate the importance of the Annual Statistics in providing data for the same uses represented in question 1. Respondents were asked to indicate whether the Annual Statistics was essential (value=1), somewhat important (value=2), or not important (value=3) in providing data for each activity. The average value for each activity and the number of respondents is indicated in Table 3 - Importance of the Annual Statistics. The lower the average, the more important respondents, as a group, considered the Annual Statistics for providing data.

TABLE 3
IMPORTANCE OF THE ANNUAL STATISTICS

Use	Average value*	Number of respondents**
Providing comparisons between your library and others	1.19	80
Providing supporting data for budget requests	1.48	82
Providing salary information	1.53	79
Establishing benchmarks to track library development	1.63	79
Establishing benchmarks for productivity standards	1.96	72
Providing data for library resources allocation process	2.00	73
Other	2.00	5
Calculating performance measures	2.06	66
Providing data for intra-library reports	2.17	77
Providing early warning signals of trouble spots in operations	2.25	73
Providing tools for management formulas	2.29	68

* Values were 1=essential, 2=somewhat important, 3=not important
** Indicates the number of respondents out of 83 respondents who reported values of 1, 2, or 3

In order to determine if respondents' use of the Annual Statistics correlated to the ways they use data for decision making, a comparison between the rankings of question 1 and question 6 was calculated using the Spearman Rho correlation coefficient. The number of respondents who responded yes for each use indicated in question 1 was correlated with the total of respondents who indicated an importance of 1 or 2 for each use on question 6. A Spearman Rho of .955 was found (significant at the .05 alpha level, with 9 degrees of freedom) indicating a substantial correlation between the rankings in question 1 and 6.

The three major implications of this correlation are:

- There are two distinct clusters of uses made of quantitative data (the first cluster includes uses for external comparisons and justifying budget requests and the second includes uses for internal comparisons.)
- The Annual Statistics is considered very important in providing data for the most frequent uses of quantitative data indicated in question 1.
- There is a strong correlation between the rankings of uses for quantitative data in general and the rankings of the uses for which the Annual Statistics is useful (either essential or somewhat important) in providing data.

Examination of Table 2 reveals that there are four uses commonly made of quantitative data for decision making. These are for

- providing comparisons between the library and others,
- providing supporting data for budget requests,
- providing salary information, and
- establishing benchmarks to track library development over time.

These four most highly cited uses of quantitative data had response percentages ranging from 73.5 to 97.6. The response percentage is the number of respondents who checked that use divided by the number of respondents (83). These four uses are clearly separated from the other uses which show much lower but also fairly consistent response percentages from 27.7 to 48.2.

When responses to question 6 are examined, a similar pattern is revealed. The four uses for which the Annual Statistics was considered the most important for providing data (with averages ranging from 1.19 to 1.63) are the same four uses reported most frequently by respondents in question 1 as uses of quantitative data. Table 3 also shows that there is no use for which all respondents considered the Annual Statistics to be not useful. (Such an activity would have had an average value of 3.0.)

The findings suggest that library managers use quantitative data for determining their positions relative to others and for convincing administrations to provide more support to the library. Additionally, we suggest that the high correlation coefficient indicates that the Annual Statistics is a valuable source of quantitative data for AAHSLD members that is particularly effective for providing information to support respondents' most frequent uses of quantitative data. Additional research would be necessary to determine whether the Annual Statistics is used exclusively or in conjuntion with other sources of data.

PERFORMANCE MEASURES

Questions 2 through 5 on the survey assessed members' current and potential use of performance measures to aid in decision making, with performance measures being defined as data which measure the effectiveness and/or quality of library activities and services. When asked if they currently made use of performance measures,

- 31 (39.3%) responded that they currently used performance measures.
- 48 (62.8%) responded that they were not using them.

Examination of the 39 responses to the inquiry of what performance measures were in use indicated that many respondents did not have a good understanding of a performance measure. Some people mentioned methods and sources for obtaining data (e.g. RML reports, time/motion studies, user studies) rather than performance measures. Specific performance measures mentioned as being in use were of two types:

- measures of service to the user (e.g. collection development funds per user, ILL requests to ILL requests filled).
- measures of efficiency of internal operations (ILL activity to ILL staffing).

When asked in question 3 whether more performance measure data should be included in the Annual Statistics,

- 38 (45.8%) responded yes.
- 36 (43.4%) responded no.
- 9 (10.8%) gave no response.

39 respondents provided examples of potential performance measure data to be included. As with the open-ended responses to question 2, many of the examples could not be considered performance measures by our definition.

While respondents were equally divided on whether more performance data should be included in the Annual Statistics, when asked in question 5 whether they would be willing to report more data in order to allow presentation of more performance measures in the Annual Statistics,

- 62 (75.7%) said they would be willing to report more data.
- 17 (20.5%) said no, they would not be willing.
- 4 (4.8%) said it depends and that libraries would need advance notice of what new data would be needed.

The difference between the results of question 3 and question 5 gives rise to several speculations. Open-ended responses to questions 2 and 4 suggest that respondents are confused about the nature of performance measures. Further investigation is needed to determine if confusion, or some other factor, is the cause of the different responses reported in questions 3 and 5.

Responses to question 5 suggest that respondents do, in fact, want more performance measures reported in the Annual Statistics. However, that might not hold true if the amount of time and effort necessary to collect and report performance measures is too great. It may be possible to recombine already collected data to present additional performance measures.

We examined the responses to question 2 and 4 as well as the Annual Statistics volume to see whether data could be recombined to provide additional performance measures without new data collection. Clientele figures are currently reported and could be combined with data concerning collection size, expenditures, facility size, or ILL activity to generate performance data measuring service to users. Some examples of possible measures are:

- expenditures per user
- seating availability per user
- ILL requests per user (as a measure of collection strength)
- operating costs per user
- serial subscriptions per user

Performance measures designed to measure the effectiveness of internal library operations could also be generated. Libraries are currently reporting staffing levels and expenditures and these data could be combined with collection data to produce additional performance measures such as:

- cataloging (or other unit) output per FTE.
- expenditures per unit output.

Members of the AAHSLD may wish to review the existing data elements to determine

- what types of performance measures could be calculated from these data elements, and
- the degree to which these performance measures could provide useful management information to member libraries.

ANNUAL STATISTICS DATA: AMOUNT, TYPES, VALIDITY, RELIABILITY

Several questions in the survey assessed respondents' perceptions of the amount of data collected, the value of that data, and the data's reliability and validity. In response to question 7, regarding the amount of data in the Annual Statistics,

- 57 (78.1%) felt the right amount of data was being collected.
- 11 (13.3%) felt too much was being collected.
- 8 (9.6%) felt too little was being collected.
- 7 (8.4%) did not respond.

Respondents were asked in question 8 which data were especially useful. 68 (81.9%) out of 83 respondents commented. Almost every type of table in the Annual Statistics was mentioned, but those mentioned most frequently were the tables depicting

- salaries, (36 respondents).
- expenditures across all library functions, (30 respondents).
- collection data including collection size and current acquisitions figures, (23 respondents).

If respondents commented on how these data were used, they cited the need to convince administrators in budget requests, and to determine their library's ranking among comparative libraries.

44 (53.0%) respondents provided comments in question 9 concerning which data were not useful. Again, as with question 8, there was a large amount of variation in the responses. Two concerns stood out.

- Respondents (18) commented on the potential lack of uniformity in some counts (e.g. reference transactions, clientele counts).
- 7 respondents specifically cited the photocopy exposure count as not being useful.

Questions 14 and 15 assessed respondents' perceptions of the reliability and validity of the data, respectively. While open-ended responses to question 9 showed some concern for reliability and validity issues, when asked to indicate perceptions using a Likert scale, averages fell in the moderately accurate range. Table 4 - Reliability and Validity Scores indicates the average values across all respondents for reliability and validity.

TABLE 4
RELIABILITY AND VALIDITY SCORES

Data Category	Average Reliability* (N=65)**	Average Validity* (N=78)**
Clientele	3.00	3.25
Collections	3.50	3.49
Expenditures	3.60	3.65
Facilities	3.97	3.73
Services	3.05	3.13
Staffing and Salaries	3.98	3.91

* On a five point scale with 1=not accurate and 5=-extremely accurate
** Not all respondents answered these questions

While it may be somewhat reassuring that respondents believe the data are "moderately accurate," additional on-site investigation in a sample of libraries would be needed to determine the actual quality of data being reported.

ANNUAL STATISTICS DATA PREPARATION AND PRODUCTS

Another series of questions focussed on the time spent by member libraries in the preparation of the data to be submitted, and on the results of that labor. Question 10 asked respondents to report the amount of time they spent preparing the data and their feelings about the amount of time spent.

- 17.85 hours was the average amount of time spent preparing the data.
- 50 (60.2%) respondents thought that the amount of time they spent was about right.
- 27 (32.5%) thought they spent too much time.
- 0 thought they spent too little time
- 6 (7.2%) did not respond.

The payoff for the amount of effort was considered worthwhile. Question 11 asked respondents to indicate their perceptions of the payoff (on a scale of 1=not worthwhile to 5=extremely worthwhile).

- 3.91 (very worthwhile) was the average value for the payoff for the effort of collecting the data.

Since it is possible to produce customized reports from the Annual Statistics, respondents were asked in question 12 whether they regularly (1 to 2 times a year) requested such reports.

- Only 3 (3.6%) respondents requested reports regularly.
- 78 (94.0%) did not.
- 2 (2.4%) respondents did not reply.

Those who did not request reports were asked to indicate the reasons why. Table 5 - Reasons for not Requesting Reports summarizes the responses.

TABLE 5
REASONS FOR NOT REQUESTING REPORTS

Reason for not Requesting	Number	% of resp. (N=78)
Can get data myself	34	43.6
Have no need for additional data	27	34.6
Did not know I could do this	24	30.8
Not sure what to request	19	24.4
Data I need not available	4	5.1
Too expensive	3	3.8
Average number of reasons checked:	1.3	

These data suggest that it may be possible to increase use of the customized report service. While the most frequent reasons for not requesting reports were that the respondent could get the data his or herself, or that there was no need for additional data, the next most frequent reasons, that the respondent was unaware of this service or unsure of what to request, suggest that increased marketing of the service might increase its use. Further, respondents may not be aware of the types of data that could be supplied and how these data might be applied as a means for improving the decision making process within their library.

Question 16 requested respondents to indicate their frequency of use of the Annual Statistics. Table 6 - Frequency of Use of the Annual Statistics summarizes the responses. The majority of respondents used the volume quite frequently, at least one a month (42.7%).

TABLE 6
FREQUENCY OF USE OF THE ANNUAL STATISTICS

Frequency	Number of respondents (N=82)	% of resp
once a month	35	42.7
once a quarter	22	26.8
once a week	14	17.1
once every 6 months	9	11.0
once a year	1	1.2
never	1	1.2

In order to investigate whether those respondents who used the Annual Statistics once a week differed in the way they used the volume from other respondents, Chi Square tests of independence were performed. Respondents were divided into two groups, those who had responded that they used the volume once a week and those who had checked any other response. This variable was cross tabulated with the uses for the volume indicated in question 6. No significant differences were found between the types of use by those who consulted the Annual Statistics once a week and those who consulted the volume at some other frequency.

This interesting finding suggests a possible lack of understanding on the part of some respondents about ways in which the Annual Statistics could be used to facilitate decision making on a regular basis. Further investigation would be necessary to verify this supposition and assess whether additional education about the uses of statistics in decision making might change usage patterns.

Question 17 asked respondents to indicate their preferred month of receipt of the Annual Statistics. Table 7 - Preferred Month of Receipt of the Annual Statistics summarizes the responses. Most respondents (40, 48.2%) preferred December or January.

TABLE 7
PREFERRED MONTH OF RECEIPT OF THE ANNUAL STATISTICS

Month	Number of Respondents (N=70)	% of Respondents
January	27	38.6
December	13	18.6
March	6	8.6
February	5	7.1
September	5	7.1
April	4	5.7
October	4	5.7
August	3	4.3
June	1	1.4
July	1	1.4
November	1	1.4
May	0	0

THE CATEGORIZATION SCHEME

Respondents were also queried on the current categorization scheme used in the tables. Question 13 provided a Likert scale which was ranked from 1=not useful to 5=extremely useful. Table 8 - Usefulness of Library Groups presents the number and percentage of respondents who circled each value. The average value was 2.71 (between somewhat useful and moderately useful).

TABLE 8
USEFULNESS OF LIBRARY GROUPS

Response	Number of respondents (N=82)	% of respondents
Not useful	21	25.6
Somewhat useful	14	17.1
Moderately useful	21	25.6
Very useful	20	24.4
Extremely useful	6	7.3

The somewhat bimodal distribution of responses caused us to question whether respondents who found the grouping useful utilized the Annual Statistics differently than those who found

it not useful. Using Chi square tests of independence, we were unable to find significant differences between uses made of the Annual Statistics by the respondents grouped according to their responses on the categorization scheme's usefulness. Further investigation is necessary to determine why some respondents find the categorization scheme useful and others not.

SUMMARIZATION OF TRENDS IN OPEN-ENDED COMMENTS

Open-ended comments were transcribed from all 96 questionnaires received before May 10, 1990 and are presented in Appendix B, Comments. The major trends represented in the comments were:

- Most respondents seem satisfied with the Annual Statistics.
- There is concern about the need for standardized definitions.
- The current grouping scheme of libraries is problematic.
- New types of information should be incorporated into the Annual Statistics.

In general, the tenor of the comments were positive. People seem satisfied with the Annual Statistics; they rely on them "warts and all," and are willing to collect data and participate in the project. Responses to question 8 indicate that the statistics provided are quite useful in making the library's case to the administration and in determining the library's position relative to other libraries.

Several concerns were raised by the respondents. Chief among these was the current method of grouping the libraries. 15 respondents provided comments on the categorization scheme. These comments were generally not favorable. Some respondents suggested that the categories be retained but that the data be presented in one combined ranking. Some respondents suggested other variables which could be added to the grouping formula such as public vs. private.

The need for more standardized definitions and formulae for collecting the data was mentioned by 10 respondents to question 18. This concern surfaced throughout the questionnaire and is represented in open-ended responses to questions 14 and 15 as well.

10 respondents also indicated additional types of information which should be reported in the Annual Statistics. The comments of all 10 reflected a desire for information on new technologies in use in the library; number of micros, availability of micro labs, CD-ROM and locally mounted database usage were among the types of information mentioned.

Finally, 5 respondents asked for the Annual Statistics data to be made available in machine readable format.

IV. FURTHER RESEARCH

This survey into the usage of the AAHSLD Annual Statistics has provided useful answers and perspectives into how AAHSLD member libraries use quantitative data in general and the Annual Statistics volume in particular. After the AAHSLD Statistics Committee members review survey results as given in this report, additional analyses of survey contents may become evident.

The survey has also provided some insight into areas where additional research might prove fruitful. These areas are

- data reliability and validity,
- the categorization scheme,
- performance measures and their use, and
- the educational needs of members in the area of the uses of data and performance measures for decision making.

While the survey was able to assess members' feelings about the reliability and validity of data in the Annual Statistics, it was not able to determine how accurately the data are being collected, or whether they are valid. Answers to these questions can only be found through on site investigation.

Open-ended comments suggest that members are not completely satisfied with the categorization scheme as it now stands. At issue here is how best to provide comparative groupings and what criteria to use as a basis for such groupings. Additional research is needed to determine what variables members consider important in distinguishing medical libraries and whether it is possible to reanalyze the existing database to generate different categories. Techniques such as focus groups or individual interviews might provide the necessary information.

The survey results (questions 2-5) indicated that respondents were confused as to the definition of a performance measure. It is not clear from the survey whether respondents are also unsure about the application of performance measures in decision making. Further research, using focus groups or individual interviews, might provide additional information about members' use of performance measures. This research effort might

assess member libraries' needs for performance measures and determine

- what measures could be produced from existing data,
- what measures would require additional data collection, and
- the degree to which member libraries really use and would collect performance measure data.

The survey's results suggest that the AAHLSD or the Medical Library Association might wish to consider the development of a number of Continuing Education modules in the areas of using data for decision making, uses and applications of performance measures, designing in-house Management Information Systems (MIS) for use in library decision making and planning, and other related topics. Greater attention to educating library managers about performance measures and how such techniques can be linked to management topics such as evaluation of services, planning, MIS, etc. may be necessary if library managers (including department heads) are to better manage scarce resources in light of increased demands.

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THE USE OF THE AAHSLD ANNUAL STATISTICS IN MEMBER LIBRARIES

Instructions: This questionnaire is designed to assess the current use of the *Annual Statistics* and to solicit information on how the *Annual Statistics* could be altered to improve your use of it. Please refer to the 11th edition (1987-1988) as you answer these questions. Please answer all questions and feel free to attach additional sheets to provide further information.

1. Within your library, what uses are made of quantitative data to improve decision making? Check all that apply.

___ providing supporting data for budget requests

___ providing data for intra-library reporting

___ providing tools to calculate management formulas

___ establishing benchmarks for productivity standards

___ establishing benchmarks to track the library's development over time

___ providing salary information

___ providing data for the library resources allocation process

___ providing early warning signals of trouble spots in your library's operation

___ providing comparisions between your library and other libraries

___ calculating performance measures (data which measure the effectiveness and quality of library activities and services)

___ other (please specify) _____

2. Does your library use any performance measures (data which measure the effectiveness and quality of library activities and services) to aid in decision making? _____ Yes _____ No
If yes, what measures do you use?

_____

_____

3. Should more performance measure data be included in the *Annual Statistics*? _____ Yes _____ No

4. If yes, in which areas?

___ Clientele (possible examples) _____

___ Collections (possible examples) _____

___ Expenditures (possible examples) _____

___ Facilities (possible examples) _____

___ Services (possible examples) _____

___ Staffing and Salaries (possible examples) _____

5. Would you be willing to report additional data if it would allow the presentation of more performance measures in the *Annual Statistics*.

_____ Yes _____ No

6. How important is the *Annual Statistics* in providing information for the following tasks? Rank each on the following scale: (1=essential, 2=somewhat important, 3=not important).

___ providing supporting data for budget requests

___ providing data for intra-library reporting

___ providing tools to calculate management formulas

___ establishing benchmarks for productivity standards

___ establishing benchmarks to track the library's development over time

___ providing salary information

___ providing data for the library resources allocation process

___ providing early warning signals of trouble spots in your library's operation

___ providing comparisions between your library and other libraries

___ calculating performance measures (data which measure the effectiveness and quality of library activities and services)

___ other (please specify) _____

7. Is the amount of data being collected in the *Annual Statistics*

____ too much ____ just right ____ not enough

8. What data in the *Annual Statistics* do you find especially useful? Why?

_____

_____

_____

_____

9. What data in the *Annual Statistics* do you find not useful? Why?

_____

_____

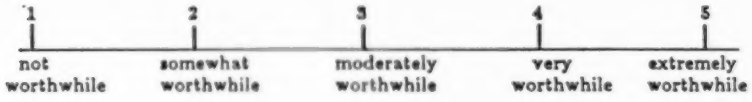
_____

_____

10. What is your estimate of the amount of time (in hours) spent in preparing data to be included in the *Annual Statistics*? _____

This amount of time is: ____ too much ____ about right ____ too little

11. To what degree is the payoff for this level of effort worthwhile for your library? Please circle the response which best applies.



12. Do you regularly (1 to 2 times/year) request customized reports generated from the *Annual Statistics*? ____ Yes ____ No
If no, check the reasons why.

___ have no need for additional data

___ too expensive

___ not sure what to request

___ can get the data myself

___ data I need is not available

___ did not know I could do this

13. Do you find the groupings of the libraries into four categories (pages 95-148) useful for purposes of comparison? Please circle the response which best applies.

14. In your opinion, how consistently, from library to library, are data in the *Annual Statistics* being reported by the member libraries? For each category, please circle the response that best applies.

	Not Accurate		Moderately Accurate		Extremely Accurate
Clientele	1	2	3	4	5
Collections	1	2	3	4	5
Expenditures	1	2	3	4	5
Facilities	1	2	3	4	5
Services	1	2	3	4	5
Staffing and Salaries	1	2	3	4	5

15. In your opinion, how well do the data <u>really</u> describe the aspects of library activities that they are intended to describe? Please circle the response that best applies.

	Not Accurate		Moderately Accurate		Extremely Accurate
Clientele	1	2	3	4	5
Collections	1	2	3	4	5
Expenditures	1	2	3	4	5
Facilities	1	2	3	4	5
Services	1	2	3	4	5
Staffing and Salaries	1	2	3	4	5

16. How often do you refer to the *Annual Satistics*?

___ once a week
___ once a month
___ once every quarter
___ once every 6 months
___ once a year
___ never

17. What month would be the best time of the year for your library to receive the *Annual Statistics*? _____(month)

18. How could the *Annual Statistics* be altered to improve your use of it? (e.g. format, types of statistics included, and instructional and explanatory material)

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Thank you for your time. We are interested in knowing any other comments you may have about the use and potential applications of the *Annual Statistics*. Please return the survey in the attached envelope by April 15 to Charles R. McClure and Carol A. Hert, Syracuse University School of Information Studies, Syracuse, NY 13244-1120. Thank you.

APPENDIX B
COMMENTS

Comments are recorded verbatim from questionnaires. The number of respondents was 96. These comments include comments from questionnaires returned too late to be included in the quantitative analysis.

QUESTION 1 - USES OF QUANTITATIVE DATA - OTHER RESPONSES

Inter-library and state agency reporting, establish cost recovery goals

Providing easily accessible data to answer other surveys

Address and phone numbers

Background material on vacant positions

Anticipate using for productivity and performance review but have not yet

We are just beginning to work on these

Accreditation reviews

QUESTION 2 - DOES YOUR LIBRARY USE PERFORMANCE MEASURES/ IF SO, WHICH?

Haven't yet but probably will

Collection development funds/user; operation costs/user; loans/user; searches/user; I'm still trying to determine the value and comparison from year to year of these figures

Ill statistics and lending/borrowing ratios with local and regional libraries

Number of periodical subscriptions

Use of end-user systems (BACS MEDLINE and BACS Current Contents) by department and overtime. An increase in use equals a measure of effectiveness

RML reports, SLA documents, internal surveys

Questionnaires, data from automated system gives usage for measuring effectively of services and collections

Time/motion studies are done

QUESTION 2 (CON'T)

No except superficially-because baseline data is so difficult to collect and comparative data even with Annual Statistics is so difficult to calculate

In-house user questionnaire

Use in ad hoc way, e.g. when I wonder whether my ILL staff is sufficiently productive, I compare staffing information and activity information. I do not routinely monitor a predefined set of performance measures/ratios other than activity figures

Journal use statistics, circ statistics, end user studies, user group studies

monograph/total volumes; serials $/total $; ILL requests/ILL filled

Serials expenditures to total acquisition expenditures

We do not look closely at these. As yet I have not formally incorporated the data into planning, but plan to do so soon. I think these are some of the best statistics available.

Monthly services statistics generated by each department, statewide automated ILS generates data

Docline statistics for ILL; turnaround time, reasons for not filling, routing effectiveness, etc.

Key area for us as I suspect for most people. it is one thing to count number of volumes on the shelves, it is quite another to be sure that one has the right volumes for one's clientele, but at least one can count volumes with some accuracy (or ILL transactions, gate count, number of online searches) when we get to area of reference transactions we can't even get accurate counts. We gather rough estimates, and they are useful in helping us gauge how workload ebbs and flows during the course of the academic year, for example, but they don't really tell us how well we're serving our clientele. We would be happy to expend more energy gathering data if we felt that the data could help us answer that question.

Number of persons per area quantity produced in area (shelvers vs. number of items shelved)

Performance measures currently used for comparison purposes not decision making

QUESTION 2 (CON'T)

User surveys, interviews, inventories, integrated system reports

Reference transactions/reference desk hours; total public service activities/staff

Circulation statistics for retention of serial titles, reference questions answered to determine staffing of information desk

Serial expenditures, staff development and travel, main reference

Basic unit cost studies

Have looked at staffing and workload in ILL, database searching, reference service staffing and workload

Results of user surveys, evaluations of instructional activities

ILL activity compared to ILL staffing

Productivity to determine additional staff needed

Medical schools in Canada; university libraries in Canada

Surveys to clientele, self-studies

We use productivity measures, the current raw tables provide data for us to compute for most performance issues

I have trouble with your definition of performance measures. Do we have any that measure quality?

Cost of serials by number of subscriptions

Staff development, ILL requests and staff, generated income

ILL turnaround time; negative feedback

Ratio of print monographs to total print volumes

Not derived from these data

Some might be used if more information about the selection of respondent institutions was given

User feedback and focus groups; fill rate; turnaround time; surveys

QUESTION 3 - SHOULD PERFORMANCE DATA BE INCLUDED?

If some standard measures were identified and applied consistently. ILL requests to total received is inaccurate because inconsistent and inaccurate reporting.

Useful but situations differ so widely, it's hard to use for more than simply raising questions

Probably not, but would like information on use of cd-rom and local databases

QUESTION 4 - EXAMPLES OF POSSIBLE PERFORMANCE MEASURES

GENERAL COMMENTS

The statistics should include detailed but simple instructions on sampling methodology which every library can easily adopt and religiously follow to assure quality data

Percentage of students, faculty etc. attending classes

Frankly I didn't look closely at the performance measures until receiving this survey, some of them, such as monograph titles to total print volumes and database expenditures to accesses seem silly as reflected in the results. Clearly other factors seem to be at work. Some measures are interesting such as the amount of budget spent on serials and the number of ILL requests receiving to total staff.

Need some quantitative and qualitative norms to use as benchmarks. It will not be easy but it can be done

Relationships between services and cost would be extremely helpful but not sure it's possible to get meaningful data from a questionnaire with the variety of types of service organization, self service systems, remote access, etc. Some attempt to assess amount of remote access might be worthwhile.

EXAMPLES OF PERFORMANCE MEASURES RELATING TO CLIENTELE

Ratio actual users to potential users

lib visits/# service transactions (all service transactions e.g. circulation, info desk, etc.); circulation by user group/total user group

We need help to increase our human resource allocation would like statistics that show size of professional and support staff compared to # of users (ex. 1 reference librarian per 500 users. I think we all need such data.)

QUESTION 4 (CON'T)

Breakdown of types of clients

Users v. eligible clientele

OPACS/clients

Primary clientele/professional librarian

Use relative to type of user

Affiliated vs. others

Potential vs. actual users

EXAMPLES OF PERFORMANCE MEASURES RELATING TO COLLECTIONS

$ spent per serial/number of current subscriptions by subject; $ spent per monograph title added/# titles by subject

Serials/user; books/user

Size and outside use

Collection expenditures to ILL and circulation activity

Total volumes to total collection use

Number book collect circ fm 1985

Commitment of institution to computer based projects, cd-rom, interactive videodisc

Access of online book file; nonbook files available though local online system

Availability v. retrieval; degree of subject coverage; responsiveness to requests to purchase

Serial subscriptions/primary clientele; monographs added/primary clientele

Usage data

Relation between collection size and use

Usage study reports

Current (last 10 years) size

QUESTION 4 (CON'T)

EXAMPLES OF PERFORMANCE MEASURES RELATING TO EXPENDITURES

Generated income expenditures to institutional expenditures; gifts and endowments expenditures to institutional expenditures; generated income expenditures and gifts and endowments expenditures to total expenditures; $ per paid subscription (average subscription cost); $ per paid monograph title (average monograph cost)

Expenditure/user

Ratio of salary - collections - operating expenses

Library expenditure to total institutional expenditure

Unit costs for various services

Serials expenditure/serials and monograph expenditure

Access v. acquiring expenditures

Tech process staff cost/title, volume

Expenditure breakdowns, etc.

U.S. vs. foreign publications

EXAMPLES OF PERFORMANCE MEASURES RELATING TO FACILITIES

Study seats to primary clientele; sq. feet to primary clientele; micros to # of students; AV equipment to AV materials by format

Percent of capacity used at peak periods/low periods

Micro and AV facilities/students

Space of library v total institutional space

Ratio of seating, terminals, workstations to potential users

Seating or sq. footage/primary clientele

Study space v. collections

Health science users to total seats or total ASF

Microcomputer lab use

QUESTION 4 (CON'T)

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Generated income expenditures to institutional expenditures; gifts and endowments expenditures to institutional expenditures; generated income expenditures and gifts and endowments expenditures to total expenditures; $ per paid subscription (average subscription cost); $ per paid monograph title (average monograph cost)

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Space of library v total institutional space

Ratio of seating, terminals, workstations to potential users

Seating or sq. footage/primary clientele

Study space v. collections

Health science users to total seats or total ASF

Microcomputer lab use

QUESTION 4 (CON'T)

EXAMPLES OF PERFORMANCE MEASURES RELATING TO SERVICES

Typical levels of usage by different types of users

ILL fill rate; ILL request per ILL FTE; reference transactions to hours desk staffed; searches per reference FTE; instruction contact hours per instructional FTE; total contact hours to total attending

Quid pro quo sharing arrangements

Computer searches

Service statistics/users/hours/staff

Automated functions v. service (e.g. online catalog to circulation)

New services v. type of staff giving the service; trends in use of ILL to make up for lack of collection

Use and effectiveness of reference

ILL fill rates

Collection use/primary clientele

Education activities

Types of

Hours open to total collection use

Reference, online searches

EXAMPLES OF PERFORMANCE MEASURES RELATING TO STAFFING

Staffing vis a vis ILL services, cataloging output, serials titles

Total FTE to primary clientele; professional FTE to primary clientele; paraprofessional FTE to primary clientele; support FTE to primary clientele; circulation FTE to service hours; circulation FTE to total circulation and on-site use; staff development $ to professional and paraprofessional FTE, staff development $ to total recurring expenditures (exclude grants and contracts); hours information services available to total service hours; total FTE by program; cataloging FTE by titles cataloged

QUESTION 4 (CON'T)

Staff terminals/# staff

Percent of professional staff to other staff

Positions salaries tied to experience and level of job

Relationship between # of reference librarians and hours of desk coverage

Professional staff/total staff

Professional/non professional; appropriateness of an extensive reserve service in a problem based self directed learning environment

Percentage of total budget

QUESTION 5 - WOULD YOU BE WILLING TO REPORT ADDITION DATA FOR PERFORMANCE MEASURE CALCULATION?

Yes, if special measures do not have to be taken to collect

Yes, if given a year's notice

Yes, inform year in advance so statistics can be collected

QUESTION 7 - AMOUNT OF DATA IN THE ANNUAL STATISTICS

More data would be nice if accurately reported

Answer depends on what information, perhaps too much bare quantitative data, not enough qualitative information.

The amount seems ok. Whether we are collecting the right data is the big question.

QUESTION 8 - WHAT DATA ARE ESPECIALLY USEFUL?

Expenditure means in justifying budget requests. categories of libraries, however group different institutions and imply they are all comparable, so I usually calculate my own group means

Personnel, facilities, some service measures all for comparison purposes; a few of the performance measures now reported both for comparison purposes as well as for setting performance standards

Expenditures for collection development and salaries

QUESTION 8 (CON'T)

Dollar allocations: e.g. staff development, acquisitions, salaries for budget comparisons, information for a 5 year plan etc., also size (# of volumes and physical size) to compare for possible new building

Comparative on journal holdings, expenditures for data base searching and ILL (responsiveness and collection integrity)

Number of library materials added annually, book and periodical budgets, salary information

Most of the data are scanned carefully for comparison

Collection, reference use, expenditures data

Salary data; collection size data

Collection development data; personnel allocations, salary information

Collection size rankings, salary and budget information. also ILL fill rate rankings; these have been useful in preparing operating budgets, justifying budgets and space needs

Salary, # of staff, ranking of colleges in all areas of the statistics collected

Comparisons with other libraries in same state-competition over monies

Supporting data for budget requests and salary information is very helpful, unfortunately while administration listens and seems supportive they don't give more funds because they say they don't have more funding

Budget, salary information to provide clout for financial support

Expenditures, staffing, service data, institutional data

Acquisitions budgets, I base much of my budget request on this information. As my library resides within main university library much of the other data can not be compared

# of current serials - most important statistics (the one that matters to dean of medical school); # ILLs - good measure of work and collection weakness

QUESTION 8 (CON'T)

Salary information was significant in recent request for librarians' salary market adjustment. # serials received compared to expenditures for serials for comparable libraries

Salary and budget for budget justification

Budget and salary information, comparisons between my library and others are useful as supportive data for budget requests

Salary figures-remaining competitive in recruiting; collection-figures how well are we doing vis-a-vis our peer group; others are more for your information but we want to know about other libraries

Apparently hard data: collection size, space, visits, and expenditures. While they may not be as hard as they appear, my administration understands and responds to these figures

Space (do branches have special functions and purposes) staffing (number FTE) and expenditures, collections data, and services activities

Salaries, budget, staffing for comparisons for management and budget preparation

Acquisitions, personnel

Ranking tables, provide benchmarks and trends; budget figures also

Service, collection, staffing, all for budget preparation

Expenditures, staffing, ILL, salaries, collection

Budgeting, staffing, salaries

Ability to compare across spectrum of library processes, services, acquisitions, space, etc. with libraries supporting similar programs

One is constantly challenged by dean and directors needing some statistic in 24 hours, any ongoing source of statistics is useful

Collection development statistics (count) and expenditures; salary tables, these are used for bench mark comparisons

QUESTION 8 (CON'T)

Rank order tables are extremely useful for comparisons; The Annual Statistics are recognized as valid comparative data for supporting budget requests, salary information. Most of the tables I use to provide information for other surveys-do not have to reinvent the wheel; Every year a different piece of information from Annual Statistics is used to support, defend, or promote a service of activity

Many of the rank order tables help justify budget or staff requests let us know in relationship to other libraries

Budgets especially acquisitions - use in budget request presentation; facilities - use data for new library building request; staffing size v. services provided shows administration where we stand, how we perform compared to other libraries

Expenditures-binding I have never needed to justify or request additional funds for binding

Salary, sq. feet. staff size, budget breakdown all used to convey our problems to administration

Monies spent on collections

Salary survey supports topic for which I have needed information. Other tables could be useful, just haven't needed them for support. As a new library director more of this data will be meaningful to me.

Ranking tables grouping with other libraries

Expenditure data for use in budget requests, salary data to help in justifying salary adjustments, usage data to show off activity levels to administration, personnel data (this is useful when compared with activity levels, such as ILL performance measure

Staffing levels and productivity tables

Salaries, budget, staffing

Financial data

Rankings

Expenditures and volume of operations and services

Salary, staffing, services: comparison with like institutions help justify our budget requests

QUESTION 8 (CON'T)

Salaries, acquisitions budgets, personnel breakdowns

We never use it

Salary comparative data for like libraries, expenditures, services data

Staffing levels, service and other output counts

Ranking within groups

I've used almost all of it at one time at another. Its all been useful

Most all of it has been useful at various times including expenditures, clientele served, collection, staffing. Information on how heavily services are used (circulation, reference, etc.) is less useful all by itself.

Service/usage gate count, circulation, online services, etc. allocations for workload comparisons when also looking at staffing statistics

Salary data to argue for more $$; client population comparative data to argue for increased funding for health science libraries based on peer libraries

Expenditures for budget comparisons; salary information; circulation and collection statistics for comparisons

Financial information to strengthen our case for greater funding; salary information helps us in our striving for improvement; collections-helps us in our development

Expenditure information, acquisitions statistics, service statistics, some performance measures

Salaries and expenditures - for budget justifications; Services - for comparative analyses and to identify libraries with similar service levels to consult for specific issues as needed

Expenditures/category; ILL performance measures; Service statistics. Useful for budget preparation and staff allocation.

Comparison and ranking tables. Salary data

Salary, holding, services data

QUESTION 8 (CON'T)

I've used almost all of it in the past two years of doing building plans, budget analyses, resource allocation, reality checking

Salary data. Please, please encourage directors to share their own salary data. I just got a two year 33% salary package for my professional librarians based in part on the Annual Statistics. My own raise was limited to the standard 6% administrative increment in part because I could not make a good case for inequity because other directors don't report.

Primary clients, monograph titles, serial titles, expenditures, salaries and wages. This data is used as a basis of comparison in our budget request each year.

Salary tables, Budget allocations

Salary data for comparison purposes; collection budget and salary budget for comparing our budget

Total budget, acquisitions budget, staff size, and service statistics are useful for providing comparative data for budget requests

Budgets - use the figures to derive "norms"; staffing - but I would still like breakdown into libraries that carry tech services and those that do not; current journals - as "norms"

QUESTION 9 - WHAT DATA ARE NOT USEFUL?

I have no idea how other people are reporting the data; categories of libraries, gross volumes v. titles-these definitions have changed over time and do not allow for retrospective comparisons; not sure everyone is using the same definition now; no record of in-house database searches (MEDLINE subsets, CD-ROM etc.)

Most collection data since they are highly site specific

Least used information is on circulation, photocopies, and library uses

Breakdown of reference transactions, photocopy exposures, gate count

Informational and directional numbers. these have no apparent usefulness and are highly affected by location, image, etc.

QUESTION 9 (CON'T)

Groupings into categories- doesn't fit

Some of the data requested is obtained by using non standard internal statistics and I question the reliability and validity of data from libraries I know to function differently than is reported.

Sq. feet of space, clientele

Big is not always better

Management formulas are not helpful because we are barely getting by and this kind of information doesn't seem persuasive in improving our situation

Productivity standards benchmarks data for library resource allocation not useful to this library because the staff is conscientious and budget is not large enough to need to worry about allocation of resources

I have no way of singling out such statistics as circulation, ILL, photocopies, patron count, etc.

current serials -institution only interested in current journal subscriptions. gate count, collection use, photocopy exposures (not very scientific, best we can do)

Missing data which means comparisons cannot really be made (e.g. one school may not be charged for computer center costs while another is)

In house use, I suspect these numbers are fraudulent

Detailed breakdown of allocation of staff time, data is dependent on services and operations in each library, these vary greatly

Reference activities: suspected lack of uniformity in reporting and inadequate operational definition; number of serials titles data: suspected lack of uniformity in reporting, no definitions

Breakdown of staff by function is tedious to do and I've never used the info although I do compare levels of service with numbers of staff. Too variable; rank order tables were more helpful when all libraries ranked uncategorized; expenditures-building costs are questionable; what is included varies so form institution to institution. omit

QUESTION 9 (CON'T)

Grants and contracts personnel (table 41), combine tables 37,38

Database search counts- too many factors influence #; photocopies-no real purpose; operating expenses-hard to capture and may not necessarily impact directly on each library's budget

Information on some services, such as database accesses- a poor searcher may access databases unnecessarily-not a good marker for quality or quantity of searches

Clientele, withdrawals, monograph titles, sq. feet, seating

For small library (1 person) the breakdown of FTE support for specific functions not that valuable

Performance measure tables-have never made or needed to use this type of data

Volumes in offsite storage-not relevant to our needs; photocopies-means nothing, not tied to anything (e.g. # of machines, revenue, use of offsite photocopies, etc.)

Some performance measures because inconsistent reporting or not taking into account programs served, restrictive policies etc.

Reference transactions and directions; transactions are counted or estimated in different ways by different libraries; there is enough variation in these numbers to make comparisons virtually impossible.

Free standing private institution. Some data doesn't pertain to a library, some data provides targets/goals for us but are not attainable now (e.g. budgets)

Breakdown of how many FTE's in various professional categories

Statistics that we do not keep, that we are obligated to report; also question reliability of data. Title counts not useful

All data collected now useful

Number of database accesses, irrelevant to activity actually taking place

QUESTION 9 (CON'T)

Categorization of libraries; we compare to other libraries so we recalculate rankings

Year library was established; available elsewhere

Staffing plans

(illegible) days

Item level counts (e.g. # microforms); I'm not convinced that uniform interpretation/reporting is occurring in these counts

Clientele cannot be a correct figure; this statistic should be an estimated percentage of use by certain clientele instead of raw; gate count is superficial; reference transactions without a uniform formula; this figure is nebulous

Tables in Annual Statistics should also report medians. The distributions are highly skewed and they could be more useful than means in explaining distributions.

Archives and manuscripts because we do not have a collection in this area.

Probably the high variability in clients reported plus the difficulty in dealing with large numbers of unreported clients for libraries on general campuses makes this number hard to use.

Breakout of FTE, we are too small, distribution of staff in categories difficult

Don't use all the data, but not willing to say that any is not useful

Number of staff by function, not tied to quantitative data of number of service units provided or materials processed.

Gate count - too inaccurate; total primary clients - too inaccurate due to large variations in hospital staff counts; directional transactions and total information contacts - directional transactions counts are not reliable data; database accesses - no longer important with implementation of end-user search systems

Salaries - little use as we operate under a faculty association contract

QUESTION 9 (CON'T)

Rank order tables according to library ranking groups. We prefer one overall ranking. The information about personnel activities, such as Table 36, is entirely too detailed.

Performance measures tables - too many variables affecting reported statistics to make statistics meaningful

Grants and contracts personnel (has little impact on overall staffing profiles), no. of photocopies (who cares?)

QUESTION 10 - ESTIMATE OF AMOUNT OF TIME SPENT PREPARING

Including recording of statistics, its enormous, SAMPLING!

The large amount of time is due to our being integrated into the main library

Completing surveys doesn't include collecting statistics throughout the year

Pulling together info and filling out forms takes about 20-25 hours. This does not seem like an undue amount of time. Of course, that does not include all of the time that is spent throughout the year maintaining the records that give us those results.

QUESTION 11 - THE DEGREE TO WHICH THE PAYOFF IS WORTHWHILE

Worthwhile enough, so we do it, but we cannot increase the effort. We must switch to sampling so less effort can yield more data.

QUESTION 12 - DO YOU REQUEST CUSTOMIZED RPORTS GENERATED FROM THE ANNUAL STATISTICS?

Would like machine readable summary data

Also need data in MAC format rather than IBM

Not enough indepth evaluation occurring to require additional data. We hope to change this over the next year.

So far, I've done this myself but I believe these reports can be useful

QUESTION 13 - DO YOU FIND THE GROUPINGS INTO CATEGORIES USEFUL

Machine readable data would allow customized grouping

QUESTION 13 (CON'T)

Do not like this, does not help explain rankings to dean

Not useful and completely irritating

Do not like this arrangement-like one list

Mean and median information for entire data set also useful, would also like to see public v. private, residential v. non residential

Very useful when Canadians were included

QUESTION 14 - ARE THE DATA BEING REPORTED CONSISTENTLY?

It is difficult for any one library to say how accurate others' reports are. Editors can answer this better than others. These answers are from an editor.

I am of the optimistic belief that each library provides the best possible data they can. I do not feel qualified to judge accuracy. I take the information at face value with allowances for imperfection.

I would have to assume it is reported accurately. We have found errors in our own statistics from time to time.

I can not answer this. I have to assume each person answers to the best of her ability.

No way to tell. I suspect that the margin of error is fairly large.

Having edited questionnaires for 5 years I have found some gross errors and serious lack of interest in collecting them from a subset of the libraries (5-10%) they submit #s but don't seem to care or perhaps know how to make them reasonably accurate. Having filled out questionnaire 12+ times myself, however I know that some of the requested numbers are difficult to determine accurately.

What is a serial, FTE are the problem. I was surprised to learn that Dick's library counts all directional questions, but I have never considered counting any but those put to reference desk staff when on duty.

I feel the high level of reliability of AAHSLD data is due to careful editing of each response. Some areas are soft because either institutional data are bad or hard to come by or we haven't given reporters good ways to measure consistently.

QUESTION 14 (CON'T)

Salaries, accurate; staffing counts by function are very subjective. This is an internal problem rather than one for the survey; we still do not have some of the data from the University library's accounting system.

QUESTION 15 - HOW WELL DO THE DATA DESCRIBE WHAT THEY ARE INTENDED TO DESCRIBE?

I suspect that most of the inaccuracy on the part on individual libraries tends to even out

Inter-institutional variability appears high. Intra-institutional appears low, so trend analysis should be okay.

QUESTION 18 - HOW COULD THE ANNNUAL STATISTICS BE IMPROVED?

Improve definitions of data to be reported. Drop the categories or restructure them to consider more variables that distinguish institutions - private v public, enrollments, etc.

Reduce data on collections and combine microforms with print (eliminate #55-61, 69, 71, 73-4); eliminate AV from expenditures, include with print (92-95); eliminate binding include with other operating expenditures (104-107); eliminate contracts and grants; eliminate photocopies (218); eliminate orientations (234-235) keep one category "instructional programs" and let each library define it with some general guidelines. Many lib orientation programs have substantial "instructional" content

Don't like four categories would rather see one listing for all, everything else okay

Quite satisfied

Its focus is good in the present format. I would not encourage more performance measure data but that type of information would be helpful in a separate publication. The real problem is getting libraries to report data accurately.

I realize that changes occur, but it would be nice if for some years the data requested remained constant. We have to fill out a number of questionnaires, and they all differ to some degree about the same data. This makes for extra work, and makes it difficult to collect data from year to year.

QUESTION 18 (CON'T)

Go back to old ranking format. Have people report accurate data such as salaries-in this region I personally know that several directors do not report their true salaries which are composed of a base salary and supplementary pay. Currently they are reporting only their base pay and not the supplements they receive

Complete coverage of all medical libraries

Get rid of the groupings, they have little meaning in major medical schools

The format is good. I like the ranking tables, definitions are good.

Standardized sampling instructions, machine readable report distribution

Highlight name of rank order tables, e.g. rank order of total net assignable sq. feet; name tables in non-librarian (administration-friendly) terms (e.g. rank order of total facility size) Tab sections better and use larger size page, heavier paper for section dividers; invaluable essential data, warts and all

Give us the data in machine readable form. I need a list of each question number and the name associated with the number, instructions (general for each number), library number and name, number for each library/question. I will write a program to enter data and produce my own performance measures

Remove osteopathic schools and all libraries that support anything less than a complete 4 year medical program. (such as UK Wichita). As an alternative isolate them and report separately.

A breakdown by RML region would be useful; include more operational definitions; would like to see also total serial titles currently received, including duplicates, gifts, etc.

Omit categories, or include straight ranking; Include data on provision of technology to users, micros, media labs, # PC's CD's, etc.

Need to revise public services statistics. i.e. libraries using CD-ROM for end user free searching, impacts on database accesses and online search statistics and budget; clearer definitions or standardization of services (getting better now)

QUESTION 18 (CON'T)

I locate what I need with little trouble.

Salaries by area not consistent with anything. We (KY) are still listed in area 5 which has not been accurate since the NLM merger of regions. Our benchmarks are also in areas 4,6,7,8. Either change the areas or give one national table like ARL does. This is the most frustrating part of the Annual Statistics. I have to try to utilize for our benefit of comparisons. Thanks for the opportunity to bring this up.

A fine job already in presentation; salary data for all areas would be more useful if a separate composite for ranked respondents, total, mean, median, standard deviation could be added excluding Canada data. Canada data skews U.S. comparisons

Biggest aid would be to gather information that measures effectiveness. Not sure AAHSLD stats are an appropriate tool for this however. I've not come across any descriptions of how to measure effectiveness routinely. In lieu of that, it might be worthwhile to downplay what we do keep in the way of patron interactions. Sampling actual patron interactions without attempting to define the minute differences between reference and directional questions would at least give us workload trends. I do use the Statistics and find them valuable. Look forward to seeing how they may be improved

Prefer not to have categories which are based on criteria that do not apply to us (special reports could be done for this) Annual Statistics could change its format to regional, state, something more meaningful

Committee obviously feels it is necessary to constantly tinker with the Annual Statistics not always in a positive way. Basic comparative statistics useful for most. If it is felt that more and more information should be added to an already saturated database then perhaps a separate publication should be considered. The statistics serve us well now. However, more than a questionnaire is needed if the scope and purpose of the statistics are to be entirely changed. Shouldn't this be discussed in depth at the AAHSLD meeting?

A different type face that is more readable and darker print

Make clear how things are to be counted. (Are some people counting, all others sampling for use of in house materials, same for reference statistics?) Maybe everyone should be sampling but more consistently.

QUESTION 18 (CON'T)

Although I find the Statistics frustrating at times, I believe they are beneficial to all of us. Certainly they present inaccuracies at times but they are better than many other compilations. The month of receipt is not as important and the FY. We have a reporting year and a FY thus we are always slightly off.

Eliminate the ranking categories, list all libraries in one list

For us it would be most useful to be able to break out all private independent medical schools

Greater attention to services provided: eg. microcomputer consulting, fee based reference; better information on local online resources eg. MEDLINE, MICROMEDEX, CINAHL,

Do away with grouping of libraries. Have more accurate count of people using library (gate count doesn't give true picture) More information on names of ILS used. More statistics for end users and include special section on CD-ROM. Also type of system: mainframe, micro, mini.

Well funded prestigious libraries are easily identified. Less well established or supported libraries could be recognized in some way for progress being made, contribution to the profession, higher than anticipated rankings, or other significant ways in which they contribute to the total medical library scene

National ranking rather than group rankings or in addition to the groups

Sometimes it is useful to compare within category but also want absolute rankings

Please add overall rankings regardless of grouping. Administratively the grouping is counterproductive when it comes to using the statistical information to make a case before medical school administration. Medical school administration rank themselves among other medical schools nationally and their ranking has no correlation to the grouping you use for medical libraries. Also are statistics in a package manageable enough to produce disks in LOTUS format, so that we could purchase the disks and manipulate the data ourselves?

QUESTION 18 (CON'T)

Volume count is no longer an adequate measure of success of library. Want to see more ways in which services can be included: networking, IAIMS projects, links outside walls, etc.

Format's fine but could use improved printing and typography (how about using a MAC). Could use data on use of CD-ROM and local databases

More productivity measures

Micro version which is compatible with LOTUS or other spreadsheets, online or diskette submission of data

I was part of editorial board when we went to ranking libraries in groups. I think it is interesting to know what libraries are in what group (especially my own) however I think that the rank order tables should go back to a single table -perhaps with the group number indicated. I find that when I do comparisons I look across all groups for absolute ranking. Our institution tends to compare itself to certain others which is based on other criteria than those related strictly to libraries. A single table showing who is in what group would be helpful, separate from the ranked tables

More information on outreach roles of libraries: e.g. involvement with faculty on faculty-wide but library related projects; educational activities undertaken, impact of educational endeavors

We need to be notified before the questionnaire goes out if definitions will change. Our statistics are set up as we expect you will require them. Please notify early. Also annual budget information is not really accurate for libraries on a biennial budget

Continuous changing of types of information wanted/in which form needed is a constant headache. Please stick to certain types of statistics for several years. If you need to change statistical information, how it is collected or add several questions please inform libraries at least one year in advance

Better instructions on collections; institution identity and library characteristics (appendix A) ; drop medical school program (virtually all are full), institution type (widely known or ascertainable elsewhere) ; add date of opening of current facility; date of significant expansion or renovation; insist that "year established" means year library was formed/chartered as entity regardless of physical location.

QUESTION 18 (CON'T)

I would like other information collected in conjunction with Annual Statistics: e.g. number of computer work stations available to public, number of CD-ROM subscriptions and work stations, also a regular report on automation activities; specifics of systems not just yes or no on whether something is automated. Information on support staff salaries would be helpful

I would like more info on use of audiovisuals; information on database use by endusers should be added; the statistics included tend to be very conservative; There should be more information about more recent trends in libraries as a separate section (ex. CD-ROM, consortium, outreach and marketing, in-house mainframe use of databases, microlabs, etc.) ; medians should be included in the general tables. The distributions are highly skewed.

Establish a standard measure or measures for "units of work," "units of information'" if possible. So much of what is reported could be normalized and we could report dollars spent to provide X units of information using X units of work, etc.

Discontinue the library groupings. Our administration compares itself to other leading schools of medicine as benchmarks, even if they are not comparable by the criteria used to group libraries. Also, the groupings are difficult to explain to administrators who have short attention spans.

Fine, thanks all.

Add a question on status of librarians (i.e. faculty or professional status).

See no need to alter.

Find a way to include Canadian libraries in groupings; break out staffing (and associated costs) by whether or not technical services are included

We wish each edition had a brief overview at the front which gave facts such as number of libraries responding, impact of changes such as adding the Osteopathic libraries, key averages, changes of these key numbers (total budget, acquisitons budget, collection growth). This does not need to be long, but we think it would be useful. We also wish there would be information about the current year's budgets.

QUESTION 18 (CON'T)

I feel the types of statistics and the format are basically appropriate. A more timely publication and distribution timetable would enhance the value of the statistics considerably. A projected collection (acquisitions) budget would be helpful. We are reporting current salaries and a projected current acquisitions budget would also be useful. A breakdown of that category into five areas (monographs, serials, MRDF, AV, and computer software) would, of course, be even more useful.

It could contain a paragrah on each library reporting. The paragraph would contain facts on goverance, relationships to off-site or other campus libraries; and services and functions; including automation, provided from central library or university resources. Without the context, many of the rankings or numbers are confusing or misleading.